2011 Tax Season New Client Questionnaire

Welcome aboard and thanks for becoming a client! We look forward to working with you and hope that we can work together for many years. **We ask that all new clients fill out this one page form and that you provide us with a copy of last year's tax return.** By filling out this form and by providing a copy of last year's tax return we can minimize the number of questions we ask you in order to properly prepare your 2011 tax returns!

Please list the name and birthday of each person who is listed on your 2010 tax return. Please include the year born for all birthdays listed:

Taxpayer _____ Date of birth _____
Spouse _____ Date of birth _____
Dependent _____ Date of birth _____
Dependent _____ Date of birth _____
Dependent _____ Date of birth _____
Dependent _____ Date of birth _____
Dependent _____ Date of birth _____

Primary Email Address _____

Telephone number _____(day)_____(evening)

In many cases the amount you paid in tax preparation fees in 2011 (for 2010 taxes) is a legitimate tax deduction that we can deduct on your 2011 taxes (prepared in 2012):

2010 tax return fees paid in 2011 _____

How did you hear about us? _____

We are always looking to improve the services we provide to our clients. With that in mind we would like to know why you decided to become our client this year:

_____
_____
_____
_____
_____

Thank you for filling out this short form: